



e-Pledge Setup Agreement

Please provide the following information and consent for the setup of online giving as part of your United Way Workplace Campaign.

Contact Information	
Organization:	
Employee Campaign Manager:	Email:
E-Pledge Administrator:	Email:
E-Pledge Administrator:	Email:
HR/Payroll:	Email:
Training Dates	
e-Pledge Admin/Payroll Training:	Location:
Committee Training Date/Time:	Location:
Campaign Dates	
Campaign Launch:	Campaign End:
e-Pledge Launch Email:	e-Pledge End Email:
Reminder Email 1:	Reminder Email 2:

Privacy Statement

United Way Waterloo Region Communities is committed to protecting the privacy of your employees. The employee information provided for setting up online giving will be used to solicit your employees as part of your workplace campaign, acknowledge and recognize gifts, process and receipt donations and share information about United Way. An employee can unsubscribe at any time by clicking the unsubscribe button present on all of our communications. United Way does not sell or lease personal information.

By agreeing to implement employee online giving as a part of your United Way Workplace Campaign, you consent to the use of employee information, as provided by your workplace, to solicit employees for your workplace campaign.

- Names
 Emails
 Emp IDs
 Pay Periods
 Employee Type (Employee or Retiree)

Signature – I have the authority to bind the organization Date

Name (Please Print) Title

Please provide the following information to ePledge@uwaywrc.ca *no less than 3 weeks before your campaign begins* to setup your e-Pledge website for your employees.

Employee Data File - A template of the file will be provided.

- e-Pledge Admin will upload through the "Documents" page.
- Will email it to ePledge@uwaywrc.ca

Company Logo – to be displayed on e-Pledge landing page

- Yes – will send a jpg or png file, no larger than 400x400 pixels
- No

Fundraising Goals – have you set goals for the campaign?

- Financial - \$_____
- Participation - _____%

Campaign Thermometer

- Yes - Please display on Employee Home Page
If yes, please specify the preferred thermometer type:
 - Dollars Raised
 - Percent of Goal
 - Percent of Participation
- No Thermometer, thanks

Landing Page Message

- We will provide customized messaging to add to United Way messaging
- Use only United Way messaging

Email Messaging

- We will provide customized messaging for each email
- Use generic United Way messaging

Giving Options – what options do you want available to employees? (Check all that apply)

- Payroll
- Credit Card
- Cash
- Cheque

Pay Periods for Payroll Deduction – please confirm with payroll department

- Fixed – payroll deductions will only be spread equally over the year. Number_____
- Flexible – employees can have deductions taken over a chosen number of periods.
- Other – only set number of payroll periods options available (eg. 1 and 26): _____

Gift Auto-renewal – the option for employees to give the same payroll donation year after year.

- Yes – confirm with your HR/Payroll Dept
- No

Pledge Replication – the option for employees to give the same gift as last year and/or increase by a chosen amount

- Yes
- No

Retirees

- Yes, retirees will be included in the employee data file (please identify clearly as retiree employee type)

e-Pledge System Security

- System server – Held in a locked room on-site, only accessible by United Way Admin staff and log in only possible with Admin credentials
- Sonicwall firewall – “One of the most secure, sophisticated and widely deployed small business firewall platforms on the market today” with intrusion prevention, anti-malware, anti-spam, and content and URL filtering
- SSL Certificate – Renewed each July to ensure we have the most up-to-date security

Workplace Technical Recommendations

To ensure the smoothest possible launch of your electronic campaign, the following pre-requisites are recommended for each desktop that will be using e-Pledge:

- Configure email server to Whitelist incoming email from ePledge@uwaywrc.ca
- Java script enabled – version 6 or newer
- Session cookies allowed
- All users have their security set to the Internet Zone instead of Local Intranet
- Allow PDF attachments
- Minimum Internet browser requirement of Internet Explorer 8 or above, Firefox (current), and/or any other as needed
- IE browsers should have the Internet options/Advanced “Do not save encrypted pages to disk” unchecked so they can print PDFs

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For more information, please contact ePledge@uwaywrc.ca or 519-888-6100 x253

ARE YOU
THE ONE?

iamtheone.ca



@unitedwaywrc